Purpose

This Job Aid is intended to outline where to locate text notifications in CMS, with dates and content of what was sent.

Teams Impacted
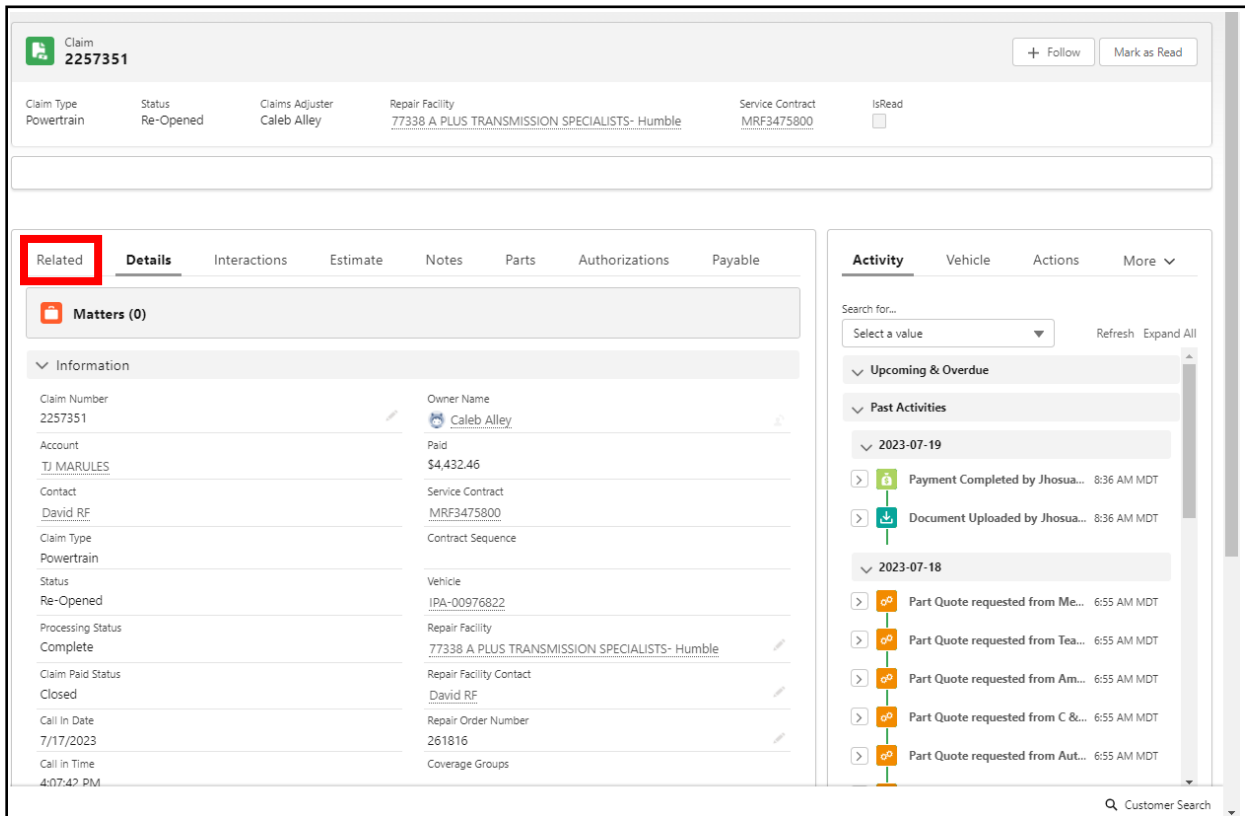
- Customer Service
- Claim

Related References and Documents

- SOP: Claim Search in CMS

Procedure

Note. Follow **SOP: Claim Search in CMS**.

1. Click on **[Related Tab]**

2. Under SMS Section, Click **[View All]**.

    a. The most recent text sent will be the very first one, you can confirm this by looking at the **Send Date**.

    b. You can locate the reason for the notification under **Template Name**.

    c. Select the **SMS Number** to see exactly what was sent in that text notification.

3. You will land on the **SMS Details** screen; under message you can see what was sent.

Note. Below is a template that will show the SMS template names with how they are triggered to be sent along with the Verbiage used in the text notification.

Text Name	Trigger	Verbiage
New Claim	Upon Claim Creation Claim Status = Open Claim Type = ANY except Roadside Only and Repair Sentry	Claim <Claim Number> with American Auto Shield was initiated by your repair facility. Please watch for updates during the claim process. Reply STOP to Opt Out.
Authorization	RF Authorization(s) *Only 1 time per Calendar day, even if triggered more than once	Claim <Claim Number> with American Auto Shield has been approved! Reply STOP to Opt Out.
Inspection Set	Authorization of Inspection Claim Item *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield has an inspection scheduled to verify coverage. A notification will be sent once it is completed. Reply STOP to Opt Out.
Inspection Completed	Inspection marked as reviewed *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield: Inspection is complete. An adjuster will contact your repair facility to review the findings. Reply STOP to Opt Out.
Part(s) Ordered	When Part is ordered *Only for the first part ordered on the claim, even if multiple parts ordered	Claim <Claim Number> with American Auto Shield: Part(s) have been ordered for your repair and will be at your repair facility soon. Reply STOP to Opt Out.
Final Invoice Paid	RF Payee is marked as Paid Status *Only 1 time per calendar day, even if triggered more than once	Claim <Claim Number> with American Auto Shield: Your claim has been paid to your shop less your deductible and any items that were not covered. Reply STOP to Opt Out.
Service Records Needed	Send Request Button in Service Records Workflow (goes along with Service Records Email) *Will send any time this is triggered	Claim <Claim Number> with American Auto Shield: More information is needed for your claim. Look for an email for details and how to submit. Reply STOP to Opt Out.
General Update	Clicking the General Update Text Message Action Button in the Action Panel Locked down for Carshield Users. Any other User will have permission to use the button. *Only 1 time per calendar day.	Claim <Claim Number> with American Auto Shield: We have been trying to reach you about your claim. Please call us at xxx-xxx-xxxx. Reply STOP to Opt Out. Note: Phone number is mapped from the Seller Claim Phone Number.

Approval & Revision

Date Created 07/21/2023	Created By Charles Dunn	Date Approved 08/04/2023	Approved By Leonard Washington Brian Coleman Johnnie Martinez

Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]